

57TH ANNUAL CONFERENCE AND TRADE SHOW  
MAY 13 – MAY 16, 2013 • THE GROVE PARK INN • ASHEVILLE, NORTH CAROLINA

# EXPANDING THE POSSIBILITIES

*LeadingAge*<sup>™</sup>  
North Carolina



# General Information

## *Registration*

Register online at [www.leadingagenc.org](http://www.leadingagenc.org). You must be logged into the site to receive member discount. You can also complete the registration form provided in this booklet and return with your payment to LeadingAge North Carolina, 100 Carolina Meadows, Chapel Hill, NC 27517. The registration deadline is April 25, 2013. For more information regarding administrative policies such as refunds and complaints, please contact the LeadingAge North Carolina Office at (919) 571-8333.

## *Continuing Education Credit*

A maximum of **17.0** hours of continuing education credit for Nursing Home Administrators can be earned by attending preconference workshops and all sessions. Each educational session will be applied for separately. For every session you attend you will be credited with CEUs. Credit applied for through the North Carolina Board of Examiners for Nursing Home Administrators and DFS for Adult Care Licensure. In addition CPEs will be applied for through the National Association of State Boards of Accountancy. A total of **18.0 CPEs** will be applied for through NASBA. Certificates of Attendance and CEU Certificates will be mailed to attendees following the conference.

## *Hotel Accommodations*

We have a block of rooms being held at The Grove Park Inn. Room reservations can be made by contacting The Grove Park Inn directly at 800-438-5800. **The deadline for hotel reservations is April 12, 2013.** A special rate of \$195.00 per night single/double has been secured. There is a \$40.00 fee for each third and fourth additional person. A deposit equal to one night's stay by a major credit card or check is required to confirm your reservation. Reservations cancelled less than 7 days prior to arrival date will be charged a fee equal to the first night's room rate.

*When making reservations, please tell the reservation agent you will be attending the LeadingAge North Carolina Conference to receive the special room rate. Reservations received after the deadline will be accepted based on availability at the standard room rates, which are considerably higher than the negotiated rate listed above.*

## *Directions*

The Grove Park Inn is located at 290 Macon Avenue, Asheville, NC 28804. From I-26 or I-40, take I-240 into Asheville, take exit 5B, Charlotte Street, proceed north on Charlotte Street for 1.3 miles, then turn right on Macon Avenue and continue 8/10 mile. The Grove Park Inn entrance will be on the left.

## *Attire*

Dress for the conference is business casual. Temperatures in meeting rooms can vary. We recommend a light jacket or sweater. Please let moderators know if there are sound/lighting/temperature problems in the sessions.

## *Cancellation Policy*

Written request for cancellation must be received at the LeadingAge North Carolina Office no later than April 24, 2013. All cancellations received prior to April 24, 2013 will be refunded less a \$50.00 administrative fee. All cancellations received after April 24, 2013 will be non-refundable.

LeadingAge North Carolina is a Registered Sponsor of continuing education with the NC State Board of Examiners for Nursing Home Administrators. Comments regarding the Registered Sponsor Course may be addressed to: 3733 National Drive, Suite 110, Raleigh NC 27612.

LeadingAge North Carolina is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org). All sessions are basic level, with no prerequisites and/or advance preparation required. All sessions are classified as specialized knowledge/applications field of study. Delivery method is Group-Live.

\* Denotes session submitted for CPEs to NASBA.

## Schedule of Events & Educational Sessions

| Monday – May 13, 2013                          |                                          | Events Will Take Place in the Vanderbilt Wing |
|------------------------------------------------|------------------------------------------|-----------------------------------------------|
| Pre-Conference Seminar:<br>Nursing Symposium   | Nursing Symposium                        | 10:00am – 4:00pm                              |
| Pre-Conference Seminar:<br>CFO Ethics Training | Professional Ethics and Conduct Training | 1:00pm – 3:00pm                               |
| Early Bird Attendee Registration               | Lobby Area (Vanderbilt Wing)             | 4:30pm – 5:30pm                               |
| Attendee/Vendor Reception                      | Outdoor Terrace                          | 5:00pm – 6:30pm                               |
| Board Meeting/Dinner                           | Country Club                             | 6:30pm – 8:30pm                               |

| Tuesday – May 14, 2013 |                                                                                                                                               | Events Will Take Place In the Vanderbilt Wing |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|
| Morning Wellness       | Wake Up For Wellness: Yoga, Walk, Run                                                                                                         | 6:00am – 6:45am                               |
| Early Bird Session     | Breakfast with the NC Medical Care Commission<br>and Department of Insurance<br>(Breakfast available at 7:00am, Discussion begins at 7:30)    | 7:30am – 8:30am                               |
| Attendee Registration  | Attendee Registration                                                                                                                         | 7:00am - 9:00am                               |
| Opening Session*       | Perspective from LeadingAge<br>Larry Minnix, LeadingAge                                                                                       | 9:00am – 10:30am                              |
| Concurrent Session 1A  | CEO Track<br>Senior Ideas: Widgets & Gadgets to Support Independence<br>Tim Mueller and Melissa Pritchard, SFCS                               | 11:00am – 12:00pm                             |
| Concurrent Session 1B* | CFO Track*<br>Watts in Your Wallet?<br>Brandon McCraney, Sodexo                                                                               | 11:00am – 12:00pm                             |
| Concurrent Session 1C  | Clinical Track<br>Changing the Way We Care for Elders<br>Vonda Hollingsworth, Pennybyrn at Maryfield                                          | 11:00am – 12:00pm                             |
| Concurrent Session 1D  | Marketing Track<br>Turning Depositors into Residents: Understanding The<br>Emotional and Financial Barriers<br>Julie Kopetsky, Your Next Move | 11:00am – 12:00pm                             |

|                       |                          |                         |
|-----------------------|--------------------------|-------------------------|
| <b>Attendee Lunch</b> | <b>Attendee Luncheon</b> | <b>12:00pm – 1:00pm</b> |
|-----------------------|--------------------------|-------------------------|

|                        |                 |                                                                                                                                                                             |                 |
|------------------------|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| Concurrent Session 2A  | CEO Track       | Priming for Innovation: Using Mental Models to Fuel<br>Innovation<br>DeAnn Akins, Carol Woods                                                                               | 1:15pm – 2:15pm |
| Concurrent Session 2B* | CFO Track*      | Social Accountability and Financial Reporting of Charity Care<br>Jeremy Naess and Greg Taylor, Dixon Hughes Goodman, LLP                                                    | 1:15pm – 2:15pm |
| Concurrent Session 2C  | Clinical Track  | Culture Change: The New Four-Letter Word!<br>Dionne James, ACTS; Katie Spegal, Plantation Estates                                                                           | 1:15pm – 2:15pm |
| Concurrent Session 2D  | Marketing Track | Social Media: Becoming a Master Social Jedi<br>Blair Carey, RetirementHomes.com                                                                                             | 1:15pm – 2:15pm |
| Concurrent Session 3A  | CEO Track       | Addressing Challenges and Growth Opportunities: Practical<br>Approaches to Governance<br>Brett Logan, Life Care Services; Robert Gall, H.J. Sims                            | 2:30pm – 4:00pm |
| Concurrent Session 3B* | CFO Track*      | Reinventing for Relevance and Unthawing Frozen Prospects<br>Roger Randall, Greystone                                                                                        | 2:30pm – 4:00pm |
| Concurrent Session 3C* | Clinical Track* | The Impact of Healthcare Reform on CCRCs<br>Tracey Murphy, Bernard Robinson & Company;<br>Marilyn Mines, Frost Rutenberg & Rothblatt PC                                     | 2:30pm – 4:00pm |
| Concurrent Session 3D  | Marketing Track | How To Assess Your Marketing and Product and Then Manage<br>Change To Rebuild Occupancy: A Case Study in Success<br>Mike Holtzclaw, Aldersgate; James Kelly, Love & Company | 2:30pm – 4:00pm |

|                          |                                                                 |                        |
|--------------------------|-----------------------------------------------------------------|------------------------|
| <b>Vendor Exhibition</b> | <b>Exhibit Hall Open</b><br>(Sample Beers from Local Breweries) | <b>4:00pm – 6:00pm</b> |
|--------------------------|-----------------------------------------------------------------|------------------------|

## Schedule of Events & Educational Sessions

| <b>Wednesday – May 15, 2013</b>     |                                        | <b>Events Will Take Place In The Vanderbilt Wing</b> |
|-------------------------------------|----------------------------------------|------------------------------------------------------|
| Morning Wellness                    | Wake Up For Wellness: Zumba, Walk, Run | 6:00am – 6:45am                                      |
| <b>Leadership Network Breakfast</b> | <b>Leadership Network Breakfast</b>    | <b>7:30am – 8:45am</b>                               |
| Attendee Breakfast                  | Attendee Breakfast                     | 8:00am – 9:00am                                      |
| Attendee Registration               | Attendee Registration                  | 8:00am – 9:00am                                      |

|                        |                |                                                                                                                                                                    |                   |
|------------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| General Session*       |                | The Fault Line of Aging Services:<br>Preparing for Industry Seismic Trends<br>Roger Landry, Masterpiece Living                                                     | 9:00am – 10:30 am |
| Concurrent Session 4A  | CEO Track      | A Website Developed by Residents for Residents -- Simple-to-Use and Feature-Rich<br>Donna Maroni and Kevin McLeod Carolina Meadows, Inc.                           | 11:00am -12:00pm  |
| Concurrent Session 4B* | CFO Track*     | Senior Living Facility Project Delivery Methods<br>Bob Romanom Brunson Russum, Jim Belvin, and Steve Chomick, Bluewater Design-Build; Dave Dougherty, Southminster | 11:00am -12:00pm  |
| Concurrent Session 4C  | Clinical Track | Heart to Heart, Miles Apart: The Magic Moments of Skype<br>Caroline Eller, Tryon Estates (ACTS)                                                                    | 11:00am -12:00pm  |
| Concurrent Session 4D  | HR Track       | Health Care Reform:<br>An in-depth look at what it means for employers<br>Wes Bartlett, Senn Dunn Insurance                                                        | 11:00am -12:00pm  |

|                                                         |                                   |                         |
|---------------------------------------------------------|-----------------------------------|-------------------------|
| <b>LeadingAge North Carolina's 2013 Awards Luncheon</b> | <b>Annual Awards Presentation</b> | <b>12:30pm – 2:00pm</b> |
|---------------------------------------------------------|-----------------------------------|-------------------------|

|                        |                |                                                                                                                       |                 |
|------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------|-----------------|
| Concurrent Session 5A  | CEO, Track     | The Top 10 Critical Issues in Senior Living Today<br>David Ratchford and Karen Montgomery, Spectrum Consultants, Inc. | 2:30pm - 4:00pm |
| Concurrent Session 5B* | CFO Track*     | Home and Community Based Services , Organizational Readiness and Reward<br>Sarah Spellman, CliftonLarsonAllen LLP     | 2:30pm - 4:00pm |
| Concurrent Session 5C  | Clinical Track | Building Better Caregivers Through Education<br>Kimberly Williams, East Carolina Behavioral Health                    | 2:30pm - 4:00pm |
| Concurrent Session 5D  | HR Track       | Personnel Policies That Protect Healthcare Institutions<br>Christopher Valentino, Jackson Lewis LLP                   | 2:30pm - 4:00pm |

|                           |                           |                        |
|---------------------------|---------------------------|------------------------|
| <b>Attendee Reception</b> | <b>Attendee Reception</b> | <b>4:00pm – 5:30pm</b> |
|---------------------------|---------------------------|------------------------|

| <b>Thursday – May 16, 2013</b>      |                                                                   | <b>All Events Will Take Place in the Sammons Wing</b> |
|-------------------------------------|-------------------------------------------------------------------|-------------------------------------------------------|
| Business/Closing Breakfast Session* | The Human Side of Ethics<br>Chuck Gallagher, Chuck Gallagher, LLC | 9:00am – 11:00am                                      |

# Session Descriptions

## **Tuesday – May 14, 2013**

### *Educational Sessions*

#### **7:30am – 8:30am**

##### **EARLY BIRD SESSION\***

1.00 CEUs

#### **Breakfast with the NC Medical Care Commission and Department of Insurance**

Listen to a panel discussion from representatives of the Medical Care Commission and the Department of Insurance. There will also be time for questions.

*Christopher B. Taylor, NC Medical Care Commission;  
Steve Johnson, NC Department of Insurance*

#### **9:00am – 10:30am**

##### **GENERAL SESSION\***

1.50 CEUs

#### **Perspective from LeadingAge**

Larry Minnix, CEO of LeadingAge, will provide an overview of issues and challenges facing long term care facilities and steps that LeadingAge is taking to address those issues.

*Larry Minnix, LeadingAge*

#### **11:00am – 12:00pm**

##### **CONCURRENT SESSIONS (1A, 1B, 1C, & 1D)**

1.00 CEU

Concurrent 1A – *CEO Track*

#### **Senior Ideas: Widgets & Gadgets to Support Independence**

iPhone, iPad, SeniorsDesign? Ground-breaking products, devices, technologies, and designs will have a major impact on the delivery of services and care provided to seniors, as well as staff and operational efficiency. These new concepts/tools create solutions that return autonomy to seniors, promote social interaction, empower caregivers and eliminate barriers. This session will explore examples of these innovative products and systems and provide real time demonstrations of how they can support independence for seniors. The presenters will also identify guiding principles when considering these products.

*Tim Mueller and Melissa Pritchard, SFCS*

Concurrent 1B – *CFO Track\**

#### **Watts in Your Wallet?**

Drawing from decades of experiential learning, industry information and statistics, and industry cases, the speaker will make a case for supporting a business model that embraces a "triple bottom line"...including health, social well-being and environmental stewardship. They most certainly can co-exist...even flourish in senior living environments. The speaker will discuss energy demand, volatility, utilization, and the markets in basic understandable terms...and why these factors contribute to costs.

*Brandon McCraney, Sodexo*

Concurrent 1C – *Clinical Track*

#### **Changing the Way We Care for Elders**

Learn about the transformational journey of a 125 bed traditional nursing home into households, complete with kitchens, dining rooms and living rooms-just like home. Gather information on both physical redesign and deep organizational redesign. Walk away inspired to make changes and with ideas for practices you can easily implement without dollars or redesign.

*Vonda Hollingsworth, Pennybyrn at Maryfield*

Concurrent 1D – *Marketing Track*

#### **Turning Depositors into Residents: Understanding The Emotional and Financial Barriers**

Is your community experiencing a decline in occupancy rates? The key to converting those depositors into residents is learning the financial and emotional obstacles of the potential residents and the tools to overcome those obstacles. Understanding the barriers that prevent potential residents from moving in will create effective communication and marketing strategies for increasing occupancy rates.

*Julie Kopetsky, Your Next Move*

#### **1:15pm – 2:15pm**

##### **CONCURRENT SESSIONS (2A, 2B, 2C, & 2D)**

1.00 CEU

Concurrent 2A – *CEO Track*

#### **Priming for Innovation: Using Mental Models to Fuel Innovation**

This session will encourage organizations to build a culture of innovation by incorporating specific strategies for engaging the right brain & integrating discovery skills into day-to-day work. While innovation starts on the top, it is imperative that an organization seeking to fuel innovation into its fabric engage people at all levels of the organization. At the conclusion of the session, participants will understand how to encourage innovation within their communities & receive a toolkit to take back home and accelerate innovative ideas to move their organization forward.

*DeAnn Akins, Carol Woods*

Concurrent 2B – CFO Track\*

### **Social Accountability and Financial Reporting of Charity Care**

Session will discuss the presentation of Social Accountability information as reported on the IRS Form 990 and Financial Statement Presentation. The presentation will discuss benefits of tax-exemption in terms of community benefit.

*Jeremy Naess and Greg Taylor, Dixon Hughes Goodman, LLP*

Concurrent 2C – Clinical Track

### **Culture Change: The New Four-Letter Word!**

Communities are constantly changing to meet the needs of our elders. However, when told to change, we can get resentful and "dig in our heels". We will discuss how to ease your community into transitions, how to recognize how perceptions, both positive and negative affect your journey, and the importance of being proactive not reactive to others' concerns.

*Dionne James and Katie Spegal, ACTS*

Concurrent 2D – Marketing Track

### **Social Media: Becoming a Master Social Jedi**

Social Media allows seemingly disconnected individuals to connect online. Senior Living Communities need to use this new media to advance their mission. Attendees will understand Social Media basics to become Social Media Masters. Senior Living Communities can use social media to create high-performing links content about the missions and histories of residences to encourage stronger stakeholder links. Social Media measures the effectiveness of campaigns. Attendees will develop successful Social Media campaigns through testing methods and analytics and become Social Media Masters.

*Blair Carey, RetirementHomes.com*

## **2:30pm – 4:00pm**

**CONCURRENT SESSIONS (3A, 3B, 3C, & 3D)**

1.50 CEUs

Concurrent 3A – CEO Track

### **Addressing Challenges and Growth Opportunities: Practical Approaches to Governance**

The world is changing rapidly, and those changes are even more apparent in the field of senior living. Challenges include not just government regulation and reimbursement, but the volatile economic climate and rapidly changing demographic profile of the senior market as well. This practical session addresses commonly faced day-to-day issues and will help board members understand critical issues that affect their organization, including effective strategies for making timely and informed decisions. Case studies will illustrate how providers have managed through challenges.

*Brett Logan, Life Care Services; Robert Gall, H.J. Sims*

Concurrent 3B – CFO Track\*

### **Reinventing for Relevance & Unthawing Frozen Prospects**

This session will focus on two major topics: 1) How long term care facilities can increase market share and 2) Tools and tactics that are motivating prospects to take action at continuing care retirement communities.

*Roger Randall, Greystone*

Concurrent 3C – Clinical Track\*

### **The Impact of Healthcare Reform on CCRCs**

Healthcare Reform and the related legislation that followed impacts all of us, as individuals, employers and healthcare providers. Reimbursement, operational requirements and quality initiatives for continuing care retirement communities (CCRCs) are a major part of these regulations. We will explore the issues facing CCRCs as employers and also the issues facing them as healthcare providers including quality of care, compliance and government oversight, QAPI, bundled payments, and value based purchasing. Included will be a review of the new functional reporting codes for Medicare Part B therapy and the possible implementation of episodic payments for Part B services.

*Tracey Murphy, Bernard Robinson & Company*

*Marilyn Mines, Frost Ruttenberg & Rothblatt PC*

Concurrent 3D – Marketing Track

### **How To Assess Your Marketing and Product and Then Manage Change To Rebuild Occupancy: A Case Study in Success**

Aldersgate is a 65-year old CCRC with a proud history, but by 2010 it found itself with an aging campus, many outdated residences and a steadily declining census that had reached 88%. Aldersgate engaged in a sales and marketing assessment process to determine an integrated plan for changes in its marketing, its physical plant and its operations. By helping the sales staff and the operations teams through these many changes, and skillful implementation with its marketing partner, Aldersgate achieved 94% within 14 months of beginning the recovery plan. This session will describe how it achieved such successful change, both from the community's perspective and the marketing consultants' perspective. The Aldersgate Marketing Director will share how the sales team embraced its new roles and how the operations team implemented a prioritized plan to spruce up and invigorate the community. Love & Company will share its strategic approach to the sales and marketing assessment, and the keys to successful implementation that have led to such strong sales results.

*Mike Holtzclaw, Aldersgate, James Kelly, Love & Company*

## **Wednesday – May 15, 2013**

### *Educational Sessions*

**9:00 – 10:30 a.m.**

**GENERAL SESSION\***

1.50 CEUs

### **The Fault Line of Aging Services: Preparing for Industry Seismic Trends**

Aging Services has undergone enormous change over the last Century. From the almshouses of the Nineteenth Century to the modern communities of today, aging services has responded to the needs of the older adult. Care is a central tenet of what we offer and we have become highly refined in delivering it to those we serve. The research on aging, however, has given us a clearer understanding of what is required to age successfully and what is possible with aging. This knowledge is partly responsible for the appearance of a new older adult with expectations of maximizing their potential and continuing to grow throughout their lifespan. This knowledge of what is possible presents us in aging services with both a moral imperative and a business requirement to evolve and become centers of excellence places for continued growth.

*Roger Landry, Masterpiece Living*

**11:00am – 12:00pm**

**CONCURRENT SESSIONS (4A, 4B, 4C & 4D)**

1.00 CEU

Concurrent 4A – CEO Track

### **A Website Developed by Residents for Residents -- Simple-to-Use and Feature-Rich**

The Carolina Meadows MeadowLife website went live in February 2011, becoming one of the first such resources made available to residents of a NC retirement community. In designing the site, ease of use and accessibility were of primary importance. Via MeadowLife, residents have access to up-to-the-minute information regarding all aspects of daily living at Carolina Meadows: activity schedules, dining options including daily menus, maintenance services, online library catalog, monthly newsletter, resident handbook, resident & staff directories, emergency announcements and much more.

*Donna Maroni and Kevin McLeod, Carolina Meadows, Inc.*

Concurrent 4B – CFO Track\*

### **Senior Living Facility Project Delivery Methods**

The various Senior Living Facility Project Delivery Methods continue to change due to market forces. Please come join a presentation and discussion on the advantages and disadvantages of the old, new and emerging project delivery methods. Discover new ways to lead the architectural and construction team to better control the costs, schedule and quality of your projects. We will compare and contrast the Design-Bid-Build, Construction Management and Design-Build systems. We will structure the presentation around the Apartment Unit Renovation and Customization Program at Southminster, CCRC which utilizes the Design-Build Project Delivery Method as the main presentation Case Study.

*Bob Romano, Bluewater Design-Build*

*Dave Dougherty, Brunson Russum, Jim Belvin, Steve Chomick,*

Concurrent 4C – Clinical Track

### **Heart to Heart, Miles Apart: The Magic Moments of Skype**

This session covers the necessary steps to set up a community video calls program. Included will be how to use email to contact family members, how to set up a weekly schedule, and how to get facility staff assistance. Seminar style presentation will include how to use email and google documents to set up weekly skype call appointments. A brief section will talk about fundraising for necessary equipment (laptop, web-cam), and a brief overview of cognitive and possible physical impairments to be aware of during video calls.

*Caroline Eller, Tryon Estates (ACTS)*

Concurrent 4D – HR Track

### **Health Care Reform: An in-depth look at what it means for employers**

This presentation will give attendees a brief history of Health Care Reform and a look forward to the proposed regulations from the perspective of employers. Attendees will gain an understanding of the questions that need to be answered in order to plan for upcoming fees and the "Pay or Play" mandate as well as discussion points for future medical insurance planning.

*Wes Bartlett, Senn Dunn Insurance*

**2:30 – 4:00 p.m.**

**CONCURRENT SESSIONS (5A, 5B, & 5C, 5D)**

1.50 CEUs

Concurrent 5A – CEO

### **The Top 10 Critical Issues in Senior Living Today**

This presentation describes the 10 most critical issues the senior living industry is facing nationally and the best practices to solve their challenges. Our findings are based on a recent survey of senior living executives from across the country and discussions that took place among 70 of the industry's top executives at Spectrum's Leadership Summit held in April, 2012. Critical issues include: Financial Viability, New Products/Services, Affordable Products, Master Planning, Healthcare Reform, the Ever-Changing Consumer and Market.

*David Ratchford and Karen Montgomery, Spectrum Consultants*

Concurrent 5B –CFO Track\*

### **Home and Community Based Services , Organizational Readiness and Reward**

This session will highlight various home and community based services options, financial investment and operating performance. The presenter will offer several tools for executives to use to help their board and senior management decide which program might be the best fit for their organization, such as a difficulty/challenge scale and a tool to help understand who will be served. Participants will gain a better understanding of the opportunity and challenges related to a variety of home and community based services programs. Real case studies will be used for illustration.

*Sarah Spellman, CliftonLarsonAllen LLP*

Concurrent 5C – Clinical Track

### **Building Better Caregivers Through Education**

A workforce of knowledgeable professionals in long term care is critical to providing high quality of care and assuring resident safety specifically to older adults with a mental health diagnosis. Our current long term care workforce in North Carolina is grossly unprepared to handle the challenges of individuals residing in long term care facilities with mental health challenges, including dementia. This presentation will provide an overview of current educational requirements, benefits of educating staff, and resources available to meet the mental health needs of LTC residents.

*Kimberly Williams, East Carolina Behavioral Health*

Concurrent 5D –HR Track

### **Personnel Policies That Protect Healthcare Institutions**

The presentation will focus on how workplace law changes, aggressive federal agencies and advances in social media impact long-term assisted living organizations, employees and personnel policies, as well as discover how implementing best practices can limit workplace disputes and forced settlements. We will outline essential policies for every long-term care employer, including: equal employment opportunity statements, sexual harassment policies, non-harassment policies, problem solving procedures, safe harbor policies, Family & Medical Leave Act policy, and at-will disclaimers.

*Christopher Valentino, Jackson Lewis LLP*

**Thursday – May 16, 2013**

Educational Session

9:00 a.m. - 11:00 a.m

BREAKFAST CLOSING SESSION

2.00 CEUs

### **The Human Side of Ethics**

While most other ethics presentations focus on legal and compliance issues, Chuck uses his personal experience to expose the truth about emotions and ethical behavior. With pinpoint accuracy, he brings to light why we do what we do and how to change behavior. When companies can help their management and employees understand the human side of ethics, the road map to success becomes much easier to follow.

*Chuck Gallagher, Chuck Gallagher, LLC*

# LeadingAge North Carolina Special Events (All in the Vanderbilt Wing)

## **Monday, May 13, 2013**

### **Nursing Symposium**

10:00am – 4:00 pm

### **Professional Ethics and Conduct Training**

1:00pm – 3:00 pm

### **Attendee/Vendor Reception**

5:00pm – 6:30 pm

### **Board Meeting**

6:30pm – 8:30 pm

## **Tuesday, May 14, 2013**

### **Wake up for Wellness**

6:00am – 6:45am

Meet your friends for group exercise

### **Breakfast with the NC Medical Care Commission & Department of Insurance**

7:30am – 8:30am

Breakfast starts at 7:00am

Panel discussion with Chris Taylor (MCC)  
and Steve Johnson (DOI)

### **Vendor Exhibition**

4:00pm – 6:00pm

Join our vendors to seek out the newest  
and best products now available.

Sample some of the best beers brewed in Asheville

## **Wednesday, May 15, 2013**

### **Wake up for Wellness**

6:00am – 6:45am

Meet your friends for group exercise

### **Leadership Network Breakfast**

7:30am - 8:45am

Presidents/CEOs/Executive Directors of Member Facilities,  
LeadingAge North Carolina Board and Platinum Business Members Only

### **LeadingAge North Carolina Awards Presentation & Luncheon**

12:30pm – 2:00 pm

Help us honor & celebrate LeadingAge North Carolina's 2013 Shining Stars  
as we present the 2013 Awards of Excellence

## **Thursday, May 16, 2013**

### **Breakfast Meeting & Closing Session**

9:00am – 11:00am

## Conference Registration Form

Register online at [www.leadingagenc.org](http://www.leadingagenc.org). You must be logged into the site to receive member discount. You can also mail the form along with a check made payable to LeadingAge North Carolina, 100 Carolina Meadows, Chapel Hill, NC 27517. Please type or legibly print all information requested. The deadline for conference registration is April 25, 2012.

Attendee Type: ☐ Attendee ☐ Speaker ☐ Vendor NHA License # \_\_\_\_\_

Attendee Full Name & Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ EMAIL: \_\_\_\_\_

**Please circle your desired concurrent educational**

**Please check the following as they apply (all included with full registration):**

☐ I am a President/CEO/ED of a Member Facility and will attend the Leadership Breakfast

**Meals/Events:** Monday: ☐ Vendor/Attendee Reception;  
Tuesday: ☐ Breakfast w/MCC & DOI; ☐ Attendee Lunch; ☐ Trade Show & Beer Tasting  
Wednesday: ☐ Attendee Breakfast; ☐ Awards Luncheon; ☐ Attendee Reception  
Thursday: ☐ Closing Breakfast  
**Morning Wellness:** Tuesday: ☐ Yoga; ☐ Run; ☐ Walk Wednesday: ☐ Zumba; ☐ Run; ☐ Walk

Tuesday - May 14, 2013

|              |    |    |    |    |
|--------------|----|----|----|----|
| 11:00 - 2:00 | 1A | 1B | 1C | 1D |
| 1:15 - 2:15  | 2A | 2B | 2C | 2D |
| 2:30 - 4:00  | 3A | 3B | 3C | 3D |

Wednesday - May 15, 2013

|               |    |    |    |    |
|---------------|----|----|----|----|
| 11:00 - 12:00 | 4A | 4B | 4C | 4D |
| 2:30 - 4:00   | 5A | 5B | 5C | 5D |

### REGISTRATION FEES:

**FULL** Conference (Fee includes all educational sessions and admission to all meals/events)

|                                                              |                            |                            |
|--------------------------------------------------------------|----------------------------|----------------------------|
| First Participant - \$495                                    | Second Participant - \$470 | 3 (+) Participants - \$435 |
| Board Member and/or Resident from Member Communities - \$200 |                            | Non-Member - \$620         |

*\*(Third person and more discount fee applies after first and second person fees are applied. Individual facilities within multi-facility organizations are considered to be separate facilities for purpose of applying the fee discounts for multiple participants. The corporate headquarters of a multi-facility organization is considered to be a facility in this context and may apply the fee discount for multiple participants who are employed at the corporate headquarters.)*

### **DAILY** Registration Fees & Additional Special Event Tickets

*\*\* (Additional tickets may only be purchased in addition to full and daily conference participation and cannot be purchased separately.)*

**Tuesday Only - \$320** (Includes All Educational Sessions, Morning Wellness, Breakfast, & Trade Show)

|                               |                        |
|-------------------------------|------------------------|
| Board Member/Resident - \$125 | Non-Member Fee - \$370 |
|-------------------------------|------------------------|

**Wednesday Only - \$360** (Includes All Educational Sessions, Morning Wellness, Breakfast, Awards Luncheon & Reception)

|                               |                        |
|-------------------------------|------------------------|
| Board Member/Resident - \$125 | Non-Member Fee - \$440 |
|-------------------------------|------------------------|

**Total Registration Fees** \$ \_\_\_\_\_

Charge to: ☐ Visa ☐ Master Card ☐ Discover  
Credit Card Number \_\_\_\_\_  
Security Code \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Card Holder Name \_\_\_\_\_  
Signature of Card Holder \_\_\_\_\_  
Billing Address: \_\_\_\_\_

**Register online:** [www.leadingagenc.org](http://www.leadingagenc.org), **mail of fax**

Checks should be made payable to LeadingAge North Carolina. Return payment with registration form to:

LeadingAge North Carolina  
100 Carolina Meadows  
Chapel Hill, NC 27517  
Fax: (919) 869-1811  
Phone: (919) 571-8333

## Extra Ticket Fees

|                                                                                                                                                                                                                    |                                       |                                                  | <b>Quantity</b> | <b>Total</b> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|--------------------------------------------------|-----------------|--------------|
| Monday<br>(5/13/13)                                                                                                                                                                                                | <i>Welcome Reception</i>              | \$45.00 pp<br>\$ 60.00 pp ( <i>Non Member</i> )  | # _____         | \$ _____     |
| Tuesday<br>(5/14/13)                                                                                                                                                                                               | <i>Attendee Lunch</i>                 | \$ 25.00 pp<br>\$ 60.00 pp ( <i>Non Member</i> ) | # _____         | \$ _____     |
|                                                                                                                                                                                                                    | <i>Trade Show</i>                     | \$ 35.00 pp<br>\$ 60.00 pp ( <i>Non Member</i> ) | # _____         | \$ _____     |
| Wednesday<br>(5/15/13)                                                                                                                                                                                             | <i>Awards Luncheon</i>                | \$ 40.00 pp<br>\$ 65.00 pp ( <i>Non Member</i> ) | # _____         | \$ _____     |
|                                                                                                                                                                                                                    | <i>Attendee Reception</i>             | \$30.00 pp<br>\$60.00 pp ( <i>Non Member</i> )   | # _____         | \$ _____     |
| Thursday<br>(5/16/13)                                                                                                                                                                                              | <i>Closing Breakfast/<br/>Session</i> | \$ 50.00 pp<br>\$ 65.00 pp ( <i>Non Member</i> ) | # _____         | \$ _____     |
| <b><i>Guest Pass:</i></b> Includes access to all events, activities and meals.<br>Available to spouse, partner, family and/or friend of<br>Community Member Attendee. Must accompany full conference registration. |                                       | \$100.00 pp                                      | # _____         | \$ _____     |

Please list name and email address of individual(s) receiving extra tickets (if applicable)

Full Name \_\_\_\_\_ EMAIL: \_\_\_\_\_

Full Name \_\_\_\_\_ EMAIL: \_\_\_\_\_

***Total Extra Ticket Fees***      \$ \_\_\_\_\_

***Total Conference Fees***      \$ \_\_\_\_\_

Charge to: ☐ Visa   ☐ Master Card   ☐ Discover  
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